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ABSTRACT

An abstract is presented for an interactive workshop in which participants solve problems in groups to learn, practice, and integrate the Learnership/Leadership Model. Learning and leading are critical for future success in educational and industrial organizations as many have expressed, including, but not limited to, C. Argyris, W. Bennis, M. Senge, and Weisbord. The Learnership/Leadership Model is built on the concepts of development and interdependence. Development suggests that individuals can only change at their own pace, and organizations can only change as individuals change. Interdependence recognizes that success is dependent on a dialectic process between schools and workplaces, learning and leading. The Learnership/Leadership Model incorporates the contributions of both education and industry and integrates these contributions into a strategy for preparing today's students and workers to be tomorrow's learners and leaders. Four exhibits illustrate the concepts. (Contains 21 references.) (Author/SLD)

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LEARNERSHIP/LEADERSHIP MODEL:

"TRAVELLING INTO THE 21ST CENTURY"©

PRESENTED AT: The 13th International Conference on Critical Thinking, August 3, 1993

BY:

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SESSION ABSTRACT FOR:

LEARNERSHIP/LEADERSHIP MODEL:

"TRAVELLING INTO THE 21ST CENTURY"

Learning and leading are critical for future success in educational and industrial organizations as many have expressed, including, but not limited to, Argyris, Bennis, Senge, Weisbord. The Learnership/Leadership Model is built upon the concepts of development and interdependence. Development suggests that individuals can only change at their own pace, and organizations can only change as individuals change. Interdependence recognizes that success is dependent on a dialectic process between schools and workplaces, learning and leading. The Learnership/Leadership Model incorporates the contributions of both education and industry and integrates these contributions into a strategy for preparing today's students and workers to be tomorrow's learners and leaders. This is an interactive workshop where participants will problem solve in groups to learn, practice, and integrate the Learnership/Leadership Model.

Debra M. Murphy &
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8/3/93

TM020643

LEARNERSHIP/LEADERSHIP Model:

"TRAVELLING INTO THE 21ST CENTURY"

In this paper and the 90-minute workshop, we will describe a model that proposes that the future for individuals and organizations demands a commitment to life-long development. Development must begin in the earliest years of schooling and continue into the workplace. Everyone will need to grow in two ways: as a learner and as a leader. The key to lifelong development is interdependence--between the individual and the organization, between the school and the workplace, between learning and leading. Development will not occur without interdependence. Success for individuals and organizations will not occur without development. Individuals can only grow at their own pace; organizations can only grow at the pace of the individuals within the organization.

The essence of the Model is that we are social beings. Learning and leading must take account of that fact. Individuals can learn--can change their ideas and behavior as a result of knowledge, experience and reflection--but they need to "learn how to learn." Leaders can lead--bring about change through others--but they need to know how to lead in a learning organization. Developing learning and leading among individuals and organizations is interdependent and shares common goals as we will exhibit in this Model.

In the following sections, we will discuss the need for life-long development, give examples of models for development

from business and education, note the obstacles to development, and describe a model called "Learnership/Leadership: A Model for Travelling into the 21st Century" that establishes a strategy for individuals and organizations to develop.

Need for Growth

The hallmarks of the last few decades and of the future are uncertainty and change. The United States has experienced two kinds of changes that significantly affect both individuals and organizations. The first kind of change reflects expansion: there are increasingly greater changes in knowledge, jobs, and social conditions; there is growing concern about our individualistic nature; there is an increasing desire for control over one's life; and there is a growing urgency to increase the number of successful learners in our schools and leaders in the workplace. At the same time, another kind of change has resulted in contraction: the world is getting smaller with globalization while human, monetary and natural resources are declining.

It appears that our problems are increasing and our ability to deal with these problems is decreasing. Many sources speak to the problem of the rapidity with which the world is changing (see, for example, Peters, 1987; Senge, 1990; Toffler, 1990). We are described as living in an information age, in constant danger of drowning in a sea of information. We have more information than many individuals or organizations can use or manage (Ward and Reed, 1983). As information changes, conditions change and jobs change. Toffler (1990) described the "Third Wave" as the

knowledge age, resulting in increased specialization and the threat of loss of control over knowledge management.

There is also a growing awareness of and concern about the individualistic, "me" orientation of our American culture (Bennis, 1990; Ferguson, 1980; Bellal, et al., 1985, 1991; Wasley, 1991). The eighties were characterized by individuals and organizations that maximized their own gains at the expense of others. Some maintain that Americans, in general, have lost a sense of "the common good" (Bellal, et al., 1985, 1991).

Despite the success of some individuals, within and outside organizations, there is an increasing expression of desire for more control over one's life and opportunities (Steinham, 1990; Toffler, 1990). As fewer and fewer people achieve the success evidenced by those "in power," there is greater unrest and dissatisfaction with those "in control," whether in education, government, religion, or business.

While there is expansion in these areas, there are equally significant contractions in other areas. By virtue of technology, the world is growing smaller. Each country is less removed from other countries, each has a greater capacity to impact on other countries. Part of the potential for impact is the decreasing resources and the question of how those resources will be distributed.

Finally, despite increasing problems, there seem to be fewer outstanding learners (creators, problem solvers, decision makers, change agents) and leaders (creators, problem solvers, decision

makers, change agents) to solve these problems. A significant number of students continue to drop out of school or leave school illiterate and unable to meet the demands of today's workplace (Chipman, Segal and Glaser, 1985; Clarke, 1990; Hyde and Bizar, 1989). Leaders are not emerging and taking on the challenges required for changing organizations to survive (Bennis, 1990).

These conditions call for change in schools and workplaces. Calls for school reform or restructuring have been on the American agenda since the early 1980's when various "commissions" reported the status of American education. Reports have called for reform of everything from the length of the school day to the curriculum to teacher education (Fullan, 1990). Several reports have described the kind of education students would need to survive in the future and the ways in which schools would have to change to provide that education.

Resnick's (Clarke, 1990) vision of the kind of thinking skills required for success in modern life includes the ability to deal with uncertainty, complexity, multiple perspectives, criteria and solutions, and the ability to regulate one's own thinking. Presseisen (1988) in addressing the needs of "at risk" students (up to 25% of the school population) says that schools should help all students to develop their own expertise in order to meet the modern academic and socio/economic demands.

Even at the adult level, Knowles (1990) sees school-based learning as problematic. Adults manage their daily lives well; but when placed in a formal instructional environment, adults,

like children, revert to the passive learning role they have been conditioned to, letting others instruct them. When asked to take a more active learning role, adults "react with confusion, resentment, and resistance" (p. 123).

If schools are to turn students into active, confident, self-directed learners with the ability to solve individual and organizational problems, changes will need to occur. However, before schools can change students, school personnel and teachers in particular must change themselves by leading the way to a new kind of learning and behavior. Leadership among school personnel will allow educational organizations to develop and change.

As well, all organizations in the world of work must change into learning organizations. Senge (1990) quotes from Fortune Magazine:

> "Forget your tired old ideas about leadership. The most successful corporations of the 1990's will be something called a learning organization."

In learning organizations, all members of the organization will constantly need to learn and to change. Argyris (1991) notes that leaders and managers have been good at identifying and solving problems (single-loop learning). However, now and in the future employees must learn how their actions are adding to the problems and change their behavior accordingly. This is called double-loop learning and will ensure the survival of organizations.

In the workplace of the future, change will be the constant, and continuous improvement will be the standard of success.

Knowing "how to learn" and change behavior will be the most basic learning skill and learning how to help others learn and change behavior will be the most basic leadership skill. One will become a learner first and a leader second.

Existing Models

Senge (1990) describes five "disciplines" that workers must master if they want to have a learning organization and to develop leaders within that organization:

- Systems thinking
- Personal mastery
- Mental models
- Building shared visions
- Team learning

A popular contemporary model of change in learning and leading that shares much in common with Senge's business model comes from the field of education. Fullan (1990) in describing educational reform says there are six key themes that are necessary for successful improvement efforts:

- A constant process of vision-building
- Constant refitting of plans to conditions
- Initiative taking and empowerment that comes from power sharing
- Staff development
- Monitoring/Problem coping
- Organizational restructuring

Fullan (1990) sees these themes being played out in the context of learning together:

> "Change involves learning to do something new and interaction is the primary basis for social learning. New meanings, new behaviors, new skills and new beliefs depend significantly on whether teachers are working as isolated individuals or exchanging ideas, support, and positive feelings about their work. The quality of working relationships among teachers is strongly related to implementation [of change]" (p. 77)

As Saronson (cited in Fullan, 1990) suggests, unless teachers work and learn in a situation conducive to change, they will not be able to model and facilitate those kinds of changes for students. Currently, educational personnel are not working in an environment (in schools) that creates conditions for learning and leading and change. Additionally, the workplace has often been slow to adapt to the dynamic, globalized market through an inability to learn new skills and knowledge and the lack of leadership in change strategies. Work organizations, like schools, must create integrated environments for learning and leading and change.

Large-scale changes are often difficult to design and implement. As Weick (1984) noted, often wide-scale, large problems are too overwhelming for people to tackle and the issues may become too emotionally charged. An effective strategy may be for individuals to redefine the problems into smaller ones that require less change and fewer people. The result is that individuals can achieve more success on a smaller scale and these changes will be longer-lasting and cumulative.

Obstacles

Both Senge and Fullan point out that change will not be easy. Senge (1990) suggests that "most organizations learn poorly" because of the way they are designed and managed, the way people's jobs are defined, and the way members are taught to think and interact. For example, organizational members believe others in the organization are not on the same team or that no one else can do a job. Managers believe they have to "take charge" and that they belong to a "management team" and not an organizational team. "Learning from experience" is a key phrase used in organizations without regard for the fact that new ways of doing things must be created. The need for these changes rarely happens overnight, rather organizations miss the signs for gradual change. Senge refers to these examples as "learning disabilities". (Senge, 1990, pp. 18-25)

Fullan (1990) sees the greatest obstacles to change and learning resulting from the training of educators, the organization of the school, and the difficulty but importance of every member of the education community finding their own meaning in changes. Of particular concern is what he describes as "teacher ethos...conservative, individualistic, and focused on the present." While individual teachers do innovate, they do not share their innovations; and working conditions are not conducive to sustained teacher innovation, nor is there a norm of continuous improvement. As well, Argyris (1991) stated that leaders are often not effective learners because of how learning

has been defined so singly on only the problems and not on the process and how the norm has to be continuous improvement.

How can we hope to bring about change in the school and in the workplace? Certainly there are many organizations structured as learning organizations, led by individuals committed to the development of the individual as well as the organization. These, however, are the exceptions (Senge, 1990; Fullan, 1990). We need models that allow individuals to develop as learners and leaders regardless of the existing structure or culture of their present organizations.

Leadership/Learnership Model

We propose a model built on the concepts of development and interdependence. Development suggests that individuals can only change at their own pace, and organizations can only change as individuals change. The capacity of the individual to change is facilitated or impeded by the organization, and the capacity of the organization to change is dependent on the individual. Interdependence recognizes that success is determined by our ability to grow through a dialectic process, responding to such issues in our relationships and organizations as:

- positive/negative,
- self/other,
- then/now,
- this view/that view,
- strength/weakness,

•stable/volatile, and

•defined/undefined.

In the past, learning was the province of schools and leading was the province of business. In the future, both schools and workplaces will need to focus on learning and leading for success. The Learnership/Leadership Model incorporates the contributions of each field and integrates them into a strategy for preparing today's students and workers to be tomorrow's learners and leaders.

The Learnership/Leadership Model is reviewed in terms of the metaphor "Travelling into the 21st Century". Travelling embodies a lot of what change is as discussed below, but it also includes excitement, anticipation, and/or anxiousness. This Model offers individuals and organizations a common point of departure for the trip toward change. The framework for the "Learnership/Leadership Model: Travelling into the 21st Century" will be presented in the following five dimensions:

- the destination or "Performances" desired,
- the itinerary or "Principles" for the trip,
- the travelling companions or "Participants",
- the map or "Processes" of implementation, and
- the vehicle or "Problems" used along the trip of change.

Learnership reviews what individuals must do internally within each dimension. Leadership proposes what organizations and leaders within organizations must do externally (of individuals) in each dimension.

The Learnership/Leadership Model integrates each dimension's contributions from education and business and/or from learning and leading (see Exhibit 1) as follows:

Dimensions	Learning	Leading
Goals/outcomes	Focus on input	Focus on output
Principles	Pacing	Motivating
Participants	Including	Influencing
Process	Thinking skills	Decision-making skills
Problems	Defined	Undefined

These contributions are built upon in the Model. The Learnership/Leadership organization, like all other organizations, is complex. Future-oriented organizations and individuals must challenge themselves to develop in all five dimensions. Each of the dimensions in the process or points in the trip will be detailed below.

Destination or Performance. In order to account for learning's strength on input and leading's strength on output, we believe that all student-workers must set points of destination or performance/goals for development in five areas: vision, empowerment, evolution, action, and accomplishment.

Vision addresses the issue of the rapidity of change. From a learning perspective, vision entails the capacity for an individual to remain open to change, to be creative and independent. From a leading perspective, vision entails the leadership within an organization to set a common vision based on the stakeholders' commonality of ideas.

Empowerment addresses the desire for control over one's life. From the learnership perspective, empowerment entails an individual learning how to learn. From a leadership perspective, empowerment entails the organization recognizing individual needs and providing opportunities for individuals to develop.

Evolution addresses the need to use resources wisely. From the perspective of learnership, evolution entails each individual recognizing and developing her/his own expertise. From the perspective of leadership, evolution entails the recognition, development and wise utilization of both internal and external resources.

Action considers the limitations of a competitive culture, school, or workplace. From the learning perspective, this requires reflection of the capacity of each individual to learn as a group. From the leading perspective, the organization must facilitate collaboration toward a common goal.

Accomplishment requires a problem-solving approach to identifying and solving problems or tasks. From a learnership perspective, this means that individuals practice problem-solving strategies to achieve their visions and to evaluate and celebrate their own achievements of visions. From a leadership perspective, the organizational leaders must enact problem-solving strategies to achieve common visions and to assess and applaud accomplishment of the visions.

In summary, the vision through performance of goals or destinations is continuous and circular requiring learning and

leading in the vision setting, empowerment of the individuals, evolution of the knowledge and resources necessary, action by collaboration, and assessment and celebration of accomplishments before beginning the process again. (See Exhibit 2.)

Itinerary or Principles. A set of operating principles provide values for all to adhere to. In learning, the guiding principle is that learners will only learn at their own pace. In leading the guiding principle is that the leaders must motivate individuals. The principles of optimal conflict, self-pacing, alternative routes, and source of energy are four principles that learners and leaders need to pay attention to.

Optimal conflict refers to valuing the need to move oneself and others toward change while maintaining a safe environment for discourse on dissatisfaction with current conditions and the need to change. Conflict here is viewed positively. In learnership, optimal conflict is an individual's awareness and understanding of a healthy balance of dissatisfaction with the status quo and a safe environment in which to change. In learnership, organizational leaders must create an environment that is safe for change and allows discussion of dissatisfaction and change.

Self-pacing is identifying when to move. In learning, self-pacing requires that individuals learn how fast and under what conditions they learn. In leading, self-pacing means that organizations are sensitive to change at a rate that is tolerable for those involved.

Alternative routes recognizes that there are multiple methods for change and development and no one is best. Participants must consider and evaluate alternatives before selecting routes. This requires learning about alternative routes and leading participants though the evaluation and selection of alternatives.

Source of energy provides a choice for selecting someone or others to go through the process with. From a learnership perspective, this requires that individuals understand what motivates them to pursue development and new learning. It means understanding our own learning skills, strategies, and styles. From a leadership perspective, organizations must provide a source of energy or motivation to facilitate the development of each individual.

In summary, these principles establish an itinerary for our trip or change process. These principles identify how we want the process to go and what values we have for participants tackling problems or tasks.

Travelling Companions or Participants. Since the early 1900's and the mandate for compulsory education, a critical question has been who should be included and whether education is an individualistic, competitive enterprise or a communal, cooperative enterprise. Recently, emphasis has been to foster inclusion (mainstreaming for example) at the same time as recognizing individual differences in learners. Business

systematically develops a selective workforce and influences workers goals, tasks, pacing, etc.

In Learnership/Leadership, an individual can travel or work for change alone or with a partner, team, organization, or community. (See Exhibit 2 and 3.) The self provides a point of departure for enacting the dimensions of the Model allowing individuals to proceed through the Model at their own pace. Then, each person needs to choose others to work with, beginning with someone whose values, skills, and processes are similar or complementary and can provide a "safe" environment for development. As the individual becomes more skilled in working with others, the learning community will expand to include others less like oneself.

A major determinant of how effective an individual can be in learnership/leadership is the organization's culture. The individuals within an organization constitute the culture. Schein (1984) defines organizational culture not only as "shared meaning" by organizational members, but an understanding of how the culture arose and how it can be changed. Within an organizational setting, an individual's goals and values may or may not match the team's or organization's goals and values. The basis for this Model is that an individual has different ways for development and is not dependent only on a match with the organizational culture. Individuals can learn to lead one's own development or another's development.

In summary, there is a choice to travel or work by oneself, but the support of working or travelling with others could be worthwhile and invaluable.

Map or Process. The processes encompass the knowledge from learning on thinking skills and from leading on decision-making skills. We believe the primary process for development is through the Learnership/Leadership cycle. (See Exhibit 3.) To develop learning potential, student-workers need to go through cycles at the personal and team level. To develop leadership potential student-workers need to go through leadership cycles at the systemic level. Learning needs to focus on thinking skills; leading needs to focus on decision-making skills. The four processes used in this Model are:

- Compare (fairness),
- Aware (empathy),
- Prepare (daring), and
- Where (caring).

Compare opportunities fairly. This entails asking questions like what's already out there, what's missing, or what are the alternatives. Individuals and organizations can explore, weigh options fairly, and compare opportunities.

Be Aware of your own views, roles, and needs and communicate them clearly to those you are working with. As well, be empathetic to the needs of those around you.

Prepare to be on this trip of change for life. This process requires individuals and organizations to learn

continually by trying new things and to lead through modelling new directions. Since this is a life-long process, dare to try something new.

Where you are going and where you have been should be assessed in a socially responsible way. Individuals and organizations must be caring of those around them and not let one's own goals and actions hinder others who are also travelling.

In summary, in the learning cycle individuals are concerned with their own learning and that of their team mates. Learners need to develop metacognitive skills to assess their own learning and learning in general, as well as empathy skills in order to be aware about the learning of others on their team. In the leading cycle, the leader is concerned with systemic effects and needs: who is learning, who needs to learn, what are the resources needed to facilitate learning, how can an opportunity for learning be provided, etc. These processes require both thinking and decision-making skills. These cycles are the maps for change or the maps for the trip.

Vehicle or Problems. Problems in this context are not viewed negatively, but rather considered to be the tasks that participants must accomplish along the way. These are the vehicles for travel or the vehicles to implement the other dimensions of the Learnership/Leadership Model. Although learning often deals with typical, defined problems, good learning models help students to progress from solving easy

(well-defined, uni-dimensional problems) to more difficult (ill-defined, multi-dimensional problems). In business, although there are routine problems or tasks, the nature of the dynamic, global marketplace is the yet-to-be defined, multi-dimensional problem.

Problems can vary along a number of continuums making some problems easier to accomplish than others. For example, problems vary from simple to complex, from nonconsequential to consequential, from instrumental to expressive, and from value-light to value-heavy.

Simple/complex refers to the number of factors and interrelationships entailed in the problem.

Inconsequential/consequential refers to the extent to which the problem has potential, long-term, systemic effects.

Instrumental/expressive refers to the degree to which the problem focus is task-completion or group welfare.

Value-light/value-heavy refers to the extent to which an individual's value system will become a significant factor in generating and accepting solutions.

Problems can be weighted on each of these continuums so that a level of difficulty to achieve each can be established. The weighing is subjective and dependent on the problem within each individual's organization. In Exhibit 4, we weighted a series of organizational problems on these four continuums to suggest a possible order of difficulty for a set of sample problems. Each has a range of 1 to 5, with 1 signifying the "easy" and 5 the

"most difficult" ends of the continuum. The weighing, of course, is based on our own perception of the problems.

Individuals can learn to choose and sequence problems based on what they feel they can manage. The standard is for continuous improvement, seeing change as a developmental process.

In summary, the Learnership/Leadership Model proposes how to develop learning and leading skills and knowledge in order to achieve an interdependent destination.

Conclusions

Individuals can see themselves progressing through three stages: practicing, modeling, and being learners and leaders. As their learnership skills develop, they will take on the leadership roles that allow them to facilitate others' learning. Leadership will be an outgrowth of a commitment to one's own life-long learning. This kind of leadership will be characteristic of the concept of servant leader (Greenleaf, 1977) and reflect leaders of whom the people say, "We did it ourselves" (Senge, 1990, p. 319).

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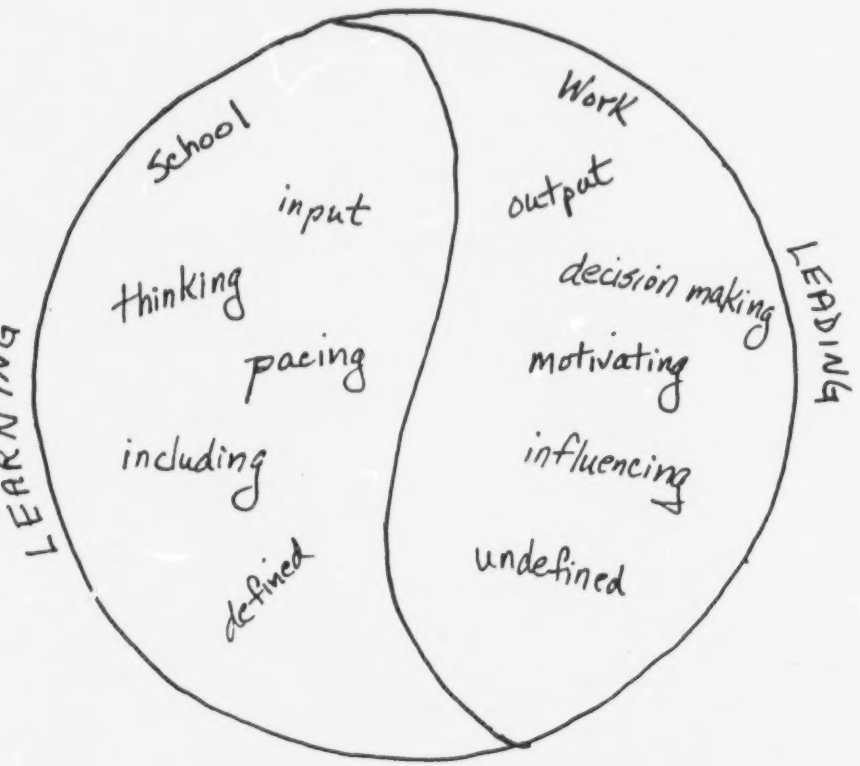
Exhibit 1

LEARNERSHIP/LEADERSHIP:

The Interdependence of Learning and Leading



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Learnership/Leadership: A Model for Individual and Organizational Development

Exhibit 2

Participants and Culture • Problems • Participants and Culture • Problems • Participants and Culture • Problems • Participants and Culture • Problems • Participants and Culture • Problems •
VISION
Maintaining openness
Setting a common vision
EMPOWERMENT
Learning how to learn
Considering individual needs and providing opportunities for growth
EVOLUTION
Recognizing & developing expertise
Utilizing resources
ACTION
Learning how to learn together
Facilitating collaboration toward a common goal
ACCOMPLISHMENT
Evaluating & celebrating individual achievement
Assessing the attainment of the common vision

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Exhibit 3

LEARNERSHIP/LEADERSHIP CYCLES:

The Process for Participants

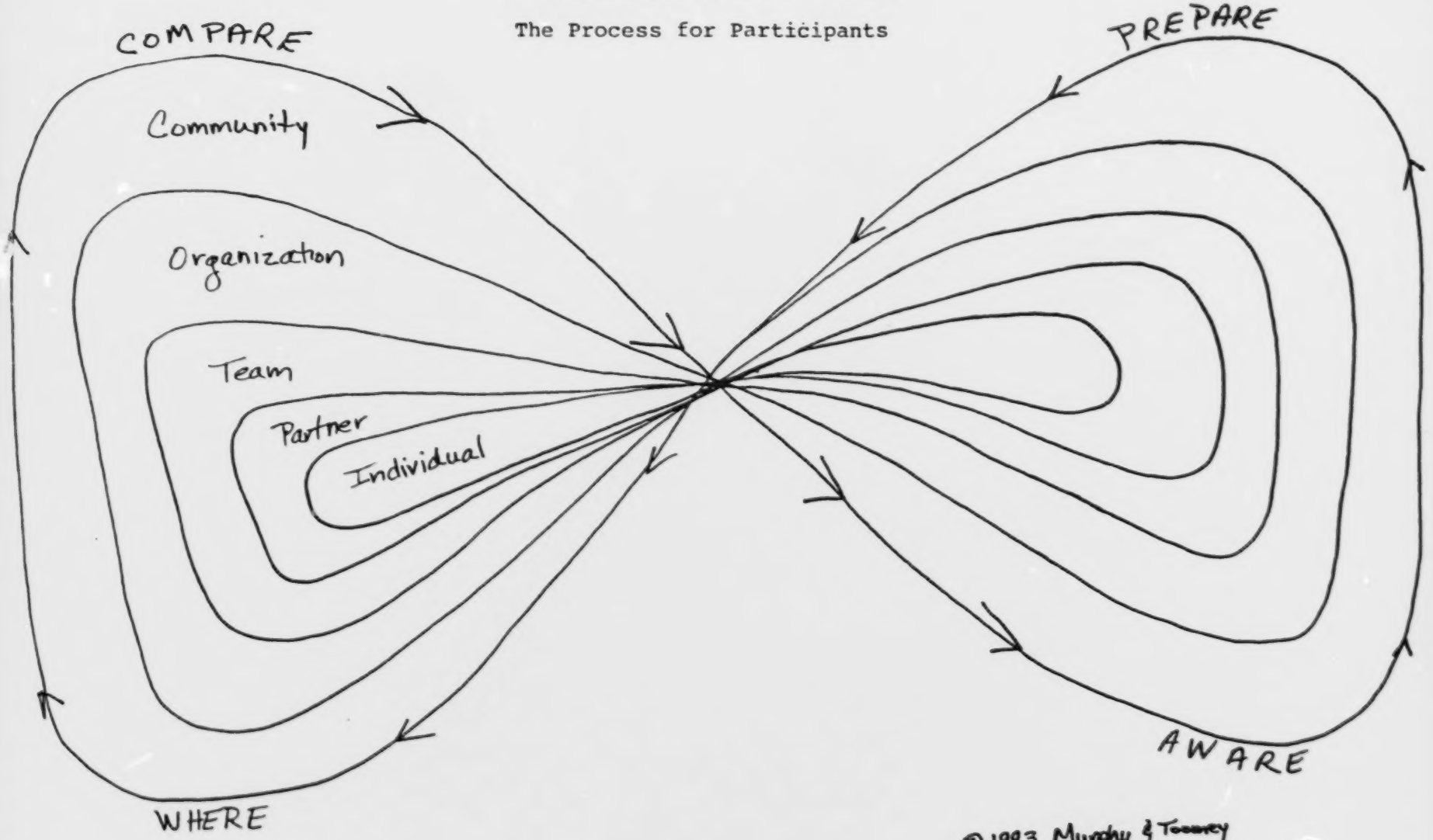

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Exhibit 4

PROBLEM WEIGHING

Typical Problems/Dimensions	Simple/ Complex	Inconse./ Conseque.	Inst./ Expre.	Light/ Heavy
AIRPLANE Make the world's best airplane.	1	1	1	1
CANNIBALS & HOBBITS Get the hobbits safely across the river.	2	1	1	1
PLAYGROUND/EMPLOYEE LOUNGE In poor repair; no funds.	2	2	2	2
EQUIPMENT Equipment is not maintained and/or replaced.	2	3	3	3
HANDICAPPED ACCESS Inadequate.	2	2	3	3
RESOURCE WASTE Perishable resources are being wasted.	3	3	3	3
TRANSPORTATION Distance causes high cost.	3	3	3	3
ABSENTEEISM Steadily increasing over time.	3	3	3	3
WHISTLE BLOWING A member of the organization has reported the cover-up of a potentially dangerous situation.	4	3	3	4
CURRICULUM/PRODUCT DEVELOPMENT World economy demands new curriculum/products.	4	4	4	3
PUBLIC RELATIONS The organization has been receiving "bad press."	4	4	4	4
EMPLOYEE EVALUATION/REWARD There is widespread dissatisfaction with the system for evaluation and reward.	5	5	5	5